



# Opsfolio CaaS for SOC 2<sup>®</sup> Type I & Type II

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Simplifying SOC 2<sup>®</sup> Compliance with Human  
Expertise and AI Automation in a white glove  
“Done for You” model.

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# Challenges in SOC 2® Compliance

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Ensuring compliance requires significant human resources.



Reporting evidence using spreadsheets takes a lot of time.



Your team is not familiar with intricate compliance standards.



Lack of systems integration creates inaccurate evidence.



Unexpected audit issues arise when your team is occupied.

*One of your primary obstacles may be insufficient personnel to handle the dozens of tasks required to successfully complete an AICPA SOC 2® audit.*

*Simply purchasing additional tools or software will not address this issue.*

# What is Opsfolio CaaS for SOC 2®?

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“Done with you” model with pre-written policy materials and software tailored for SOC 2® compliance.



A "done for you" model is available when you lack the personnel to manage unfamiliar tasks.



An integrated system for overseeing evidence, monitoring audits, and producing instant reports available in both models.

*Our service provides a comprehensive 'Done for You' approach, combining professional human assistance with AI-driven automation to manage every phase of your SOC 2® experience.*

*We guarantee that you will obtain SOC 2® certification.*

# Key Challenges We Solve

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Pre-written policies and procedures when you don't have them.



Compliance evidence can be generated from your systems.



Mock audits let you know where you stand before official audits.



Unified compliance portal for executives to see all progress.



Continuous compliance through proactive monitoring.

*We take full accountability and responsibility for delivering your SOC 2<sup>®</sup> certification through our expert white glove “Done for You” model.*



# What Opsfolio CaaS Does for You

## Human Guidance & Assistance

Our dedicated compliance advisors offer customized support, audit readiness, and assessments. **We augment your staff.**

## Security & Trust Services Criteria Mapping

We map SOC 2<sup>®</sup> Trust Services Criteria (Security, Availability, Processing Integrity, Confidentiality, Privacy) to your environment.

## Automated Task Generation & Prioritization

We produce and manage a list of prioritized remediation and audit tasks derived from identified gaps, scans, and associated risks.

## Evidence Management & Documentation

We give you a centralized and searchable database for evidence and audit materials—streamlining auditing and reporting.

## Ongoing Surveillance & Notifications

We recommend and assist you in setting up tools for the ongoing assessment of security posture and the effectiveness of controls.

## Integration within the Client's Environment

We offer resources to collect evidence from platforms such as Jira, GitHub, and security scanners for continuous compliance.

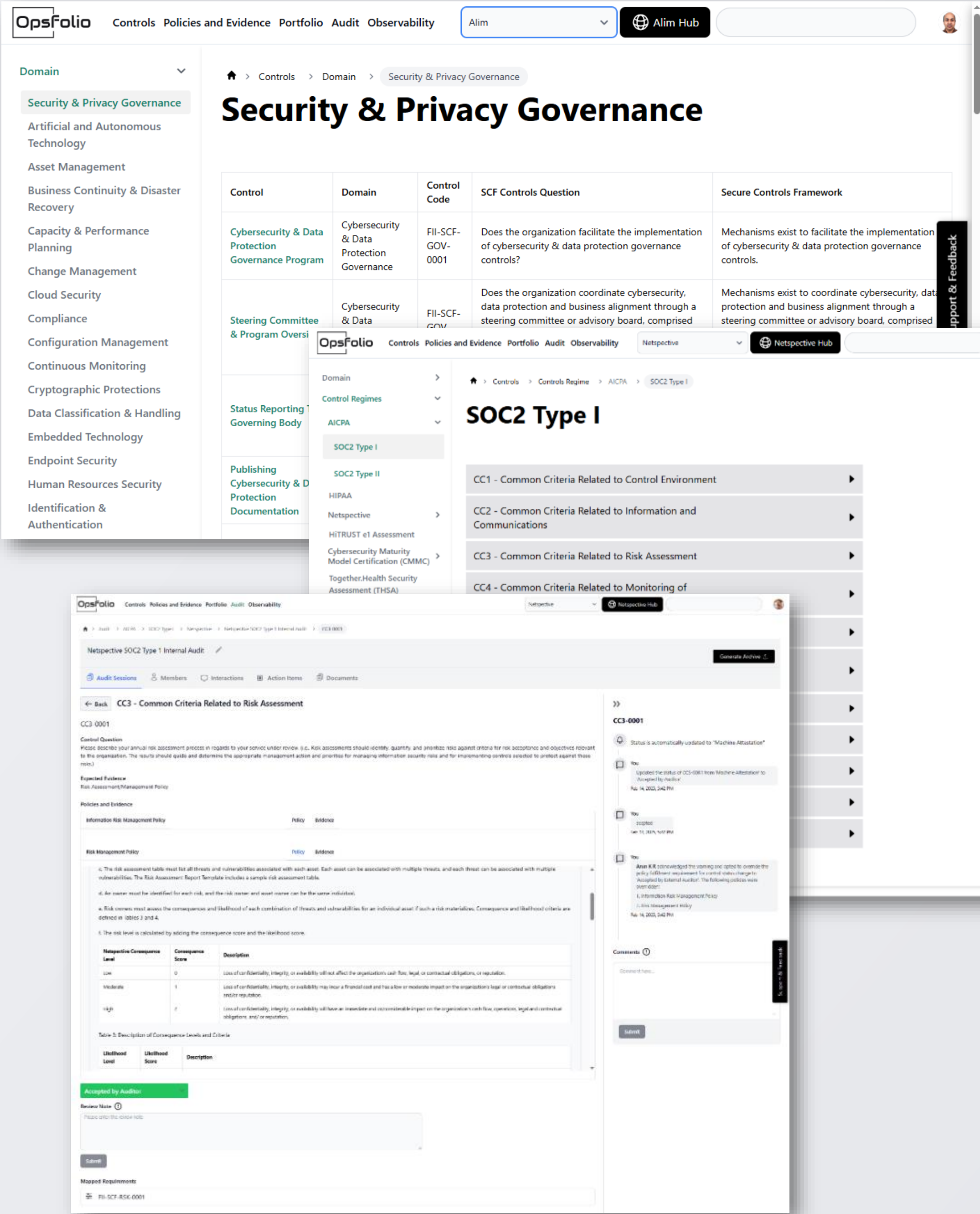
# Security & Trust Services Controls Mapping

- Comprehensive list of SOC 2® Trust Services Criteria, which includes Security, Availability, Processing Integrity, Confidentiality, and Privacy controls.
- We use your policies and procedures content where appropriate and provide pre-written or customized content when you need it.
- Ongoing monitoring of relevant controls, policies, and evaluation procedures.
- Guarantees that all controls are adequately monitored and none are missed during the compliance process.


Our team is available to guide you through the controls mapping tasks or can handle them for you if your staff is occupied.

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 Netspective  
EXTENDING THE ENTERPRISE

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## Welcome to Netspective

Welcome to the centralized Hub for Compliance Readiness.

Active Project: ISO/IEC 27001 Implementation and Internal Audit



Timeline

Q1 2025 Q2 2025

Stage


In Progress

Netspective Teams

 Geo Lazar  Arun K R +7 members

Priority


P1

 **Plan of Action and Milestones (POA&M) – Next Steps** Status Waiting


[Arun: Prepare a project plan for ISO/IEC 27001 Implementation and Internal Audit.](#)

[Arun: Prepare the SOC2 Compliance Features Comparison: Lumoar vs Opsfolio Suite](#)

[Arun: Prepare the ISO/IEC 27001 Control Mapping](#)

 **POA&M Progress Update** Status Completed


[Netspective: Customer portal has been successfully set up](#)

 **IT Governance, Risk and Compliance**


[Penetration Testing Reports](#)

[CaaS Plans for Your Business](#)

[Guide to SOC 2 Compliance & Certification](#)

 **Netspective Recent Activity** [View More](#)

No recent customer activity found. Click here to see the full activity log.

 **POA&M Status Updates**

[SOC2 Compliance Features Comparison - Lumoar vs Opsfolio Suite](#)

[ISO/IEC 27001 Control Mapping](#)

[ISO/IEC 27001 Project Plan](#)

[Evidence Collection Workflow](#)

[Penetration Testing Reports](#)

Support & Feedback

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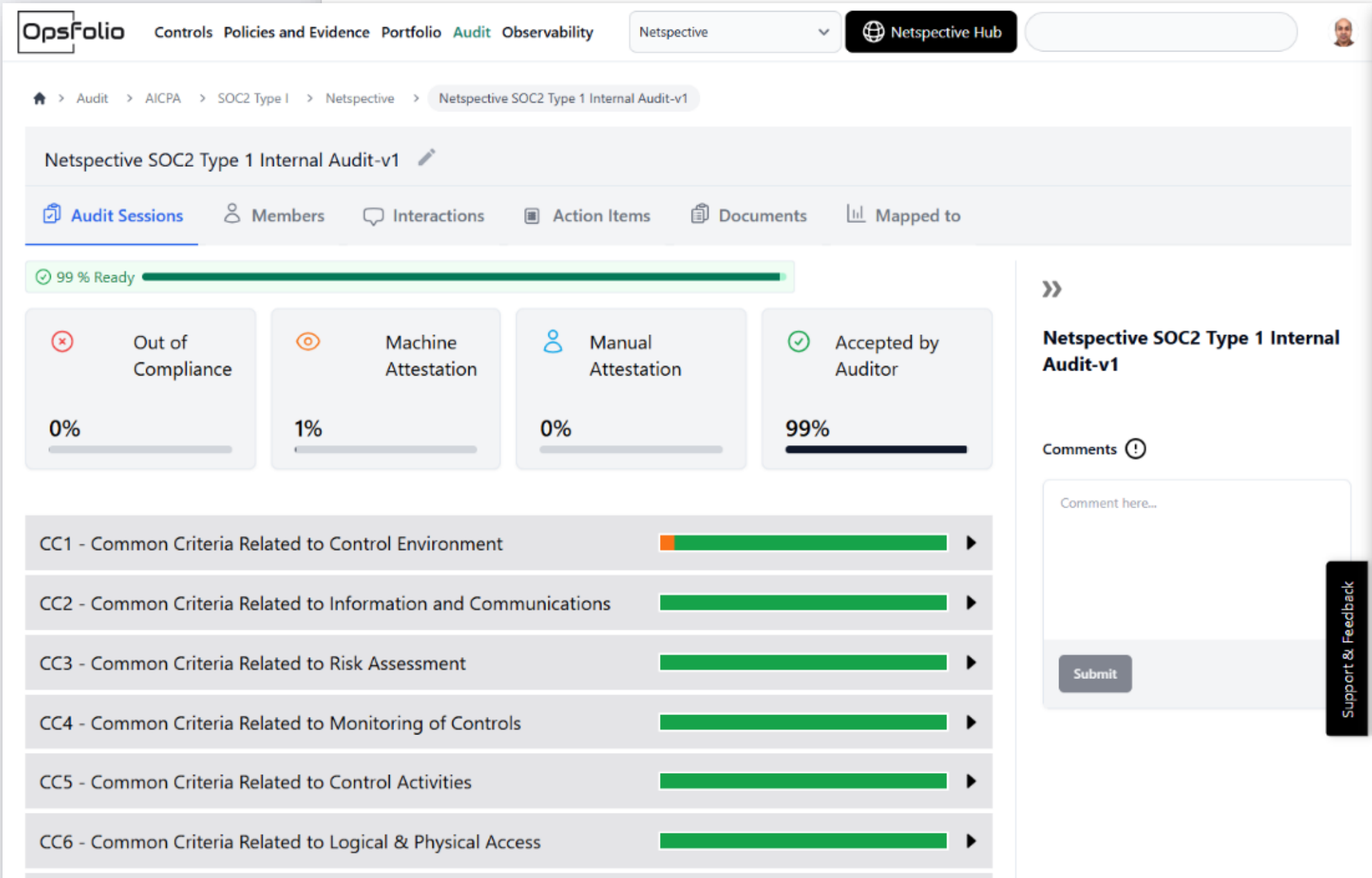
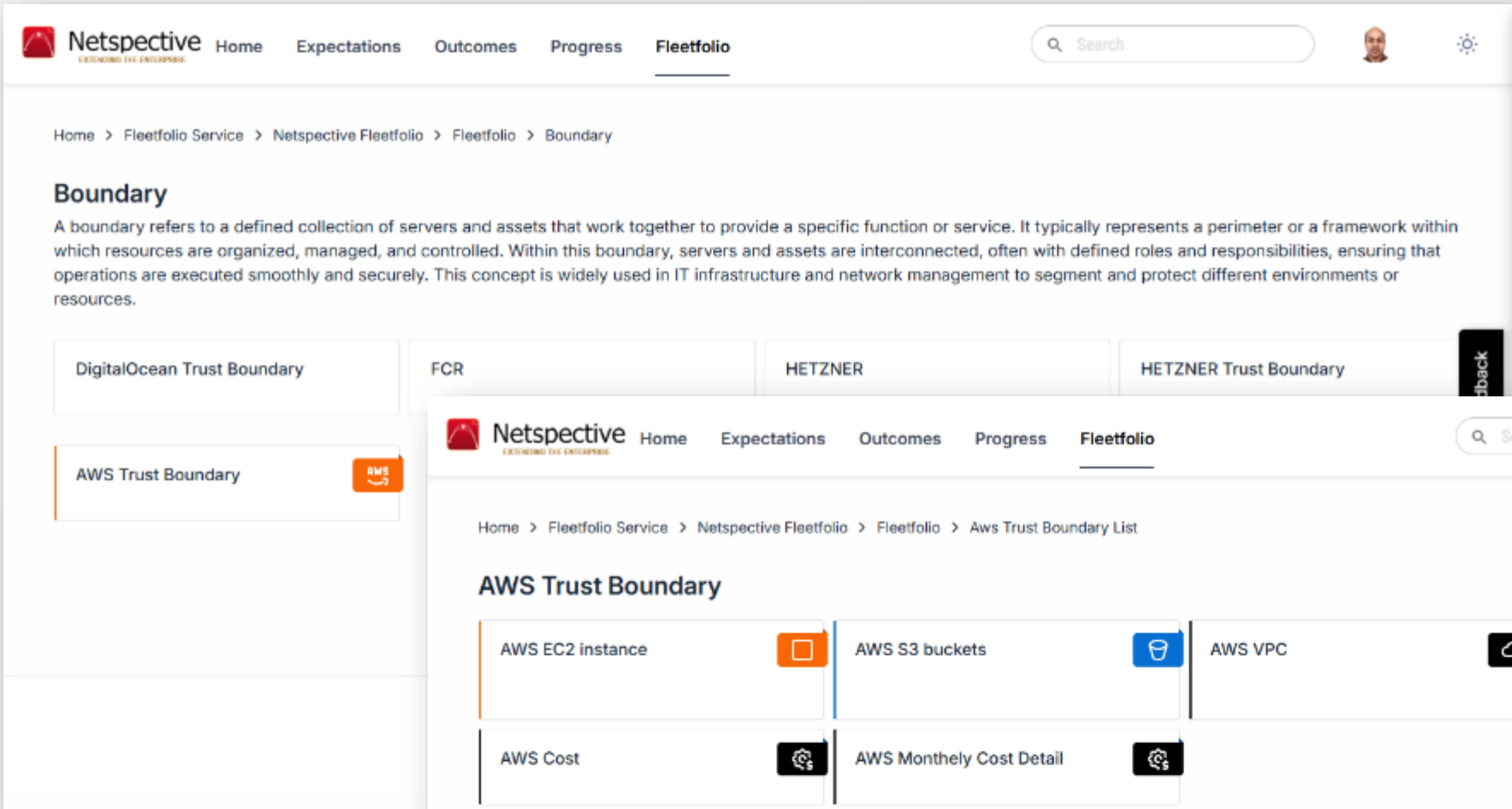
# POAMs: Automated Task Generation & Prioritization

- Our software, along with our team, collaborates with your staff to identify gaps, review scan results, and assess feedback to create prioritized compliance tasks.
- These tasks are seamlessly integrated into current workflows (such as Jira, GitHub) for swift evidence collection.
- This approach minimizes manual coordination efforts and speeds up remediation cycles.

*Through our white glove "Done for You" approach, if your team is not available, we assume complete responsibility for ensuring your tasks stay on schedule and deadlines are met.*

# Evidence Management & Documentation

- A centralized, searchable database for all audit-related materials, policies, procedures, and evidence.
- Facilitates proof of compliance during audits by providing immediate access to necessary documents.
- Offers version control, access management, and audit logs to ensure transparency.



*Our team offers comprehensive guidance and tailored tools to assist in collecting evidence with minimal effort and maximum efficiency for your group.*



# Continuous Monitoring & Alerts

- Our software and compliance management services facilitate the continuous monitoring of control effectiveness and risk factors around the clock.
- Receive timely notifications regarding any deviations or potential risks associated with SOC 2® criteria.
- This allows for proactive measures to prevent unexpected issues during audits and to uphold compliance standards.

*If your staff would like to do it themselves, they can just use our software, but if staff are unavailable, we will take care of the continuous monitoring and alerts for you.*

The screenshot displays the Netspective Hub interface, which is used for managing SOC2 Type I audits and continuous monitoring. The top navigation bar includes links to Controls, Policies and Evidence, Portfolio, Audit, and Observability, along with a Netspective Hub dropdown and a user profile icon.

The main content area is divided into several sections:

- SOC2 Type I Audit Sessions:** A table listing audit sessions with columns for Session Name, Audit Type, Tenant, Overall Progress, Due Date, Action, Edit, and Delete. The sessions include "Netspective SOC2 Type 1 Internal Audit" (100% progress), "Netspective SOC2 Type 1 Internal Audit -v2" (0% progress), and "Netspective SOC2 Type 1 Internal Audit-v1" (99% progress).
- Trust Boundaries:** A section showing various trust boundaries and their associated asset counts:
  - User Trust Boundary: 12 Assets
  - DigitalOcean Trust Boundary: 35 Assets
  - FCR Trust Boundary: 51 Assets
  - Hetzner Trust Boundary: 149 Assets
  - AWS Trust Boundary: 184 Assets
  - XYZ Trust Boundary: 240 Assets
- Activity Log:** A section showing recent activity, including a notification: "A communication failure occurred when connecting to Hetzner server."
- Asset Monitoring:** A section showing a donut chart representing the distribution of assets across different trust boundaries. The chart shows the following percentages: 37.8%, 29.3%, 14.6%, 8.3%, 4%, and 45.8%.
- Asset Listing:** A table listing assets, including their Name, Server, Asset Type, Boundary, Description, and Port. The assets are categorized by "All Servers" and "Asset Type" (Application Server, Web Server, Database, Mail Server, Directory Server, Load Balancer Software).



# White Glove Human Advisory & Support

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- Compliance specialists collaborate closely with your teams to provide customized advice.
- Assistance with preparing for audit readiness reviews, conducting gap analyses, and validating evidence.
- Support for engaging with auditors and planning for remediation.
- Aid in creating vendor assessment documents and other related reports necessary for finalizing sales or revenue.

*We provide a white glove "Done for You" service helping complete every stage of the SOC 2<sup>®</sup> process. **You're never on your own.***

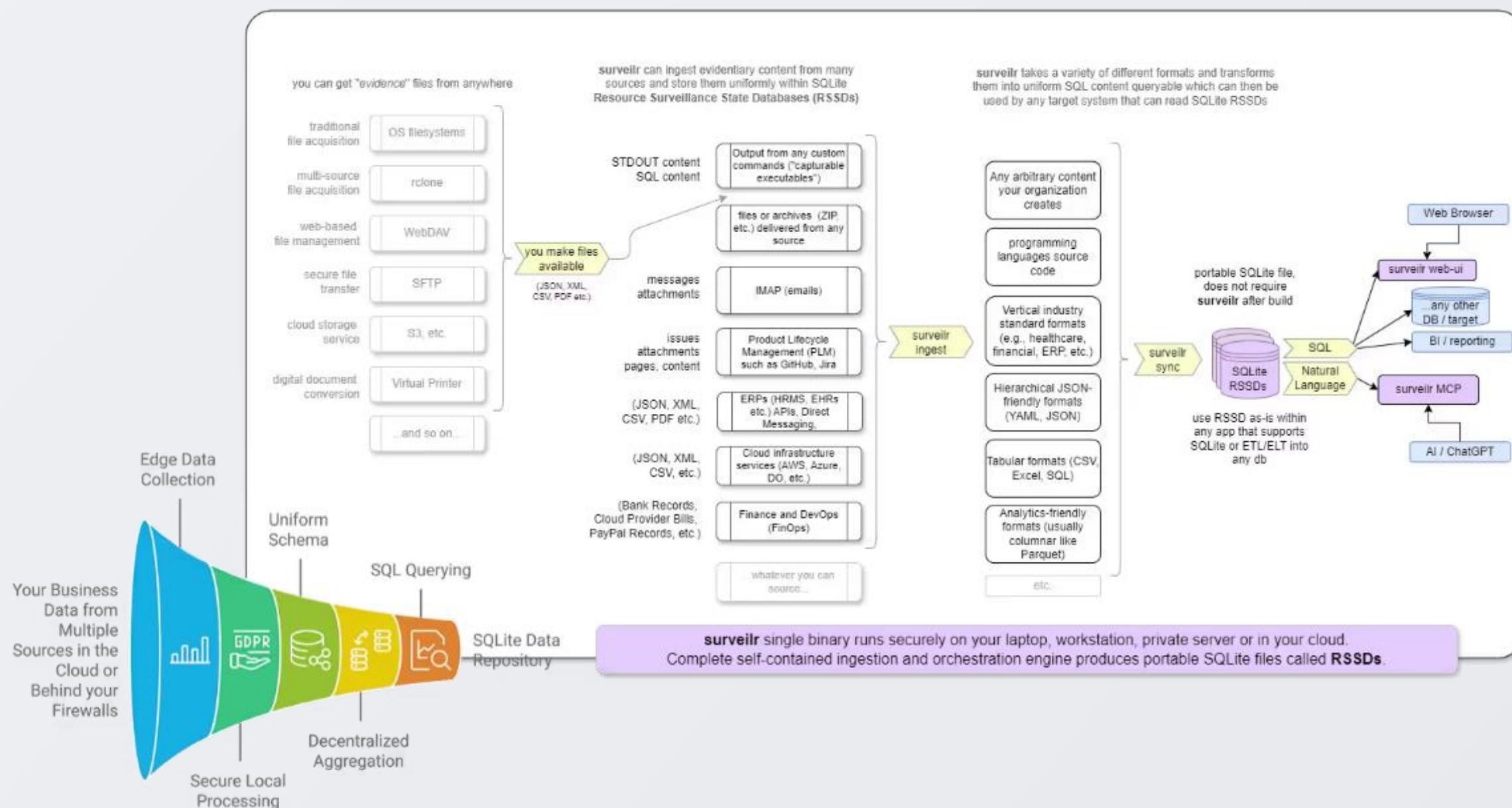
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# Opsfolio CaaS lives in your Environment



- Our staff provide tools and techniques to help your staff generate evidence from platforms such as Jira, GitHub, security scanners, and ticketing systems.
- Continuously gathers data from many different sources such as vulnerability scans and cloud services admin interfaces.
- Consolidates evidence and updates on tasks to ensure an up-to-date compliance status.

*Our white glove "Done for You" model means we will manage all integrations, ensuring seamless synchronization with your existing tools and minimal effort required from your team.*





# The Opsfolio CaaS Advantage: Human + AI Collaboration

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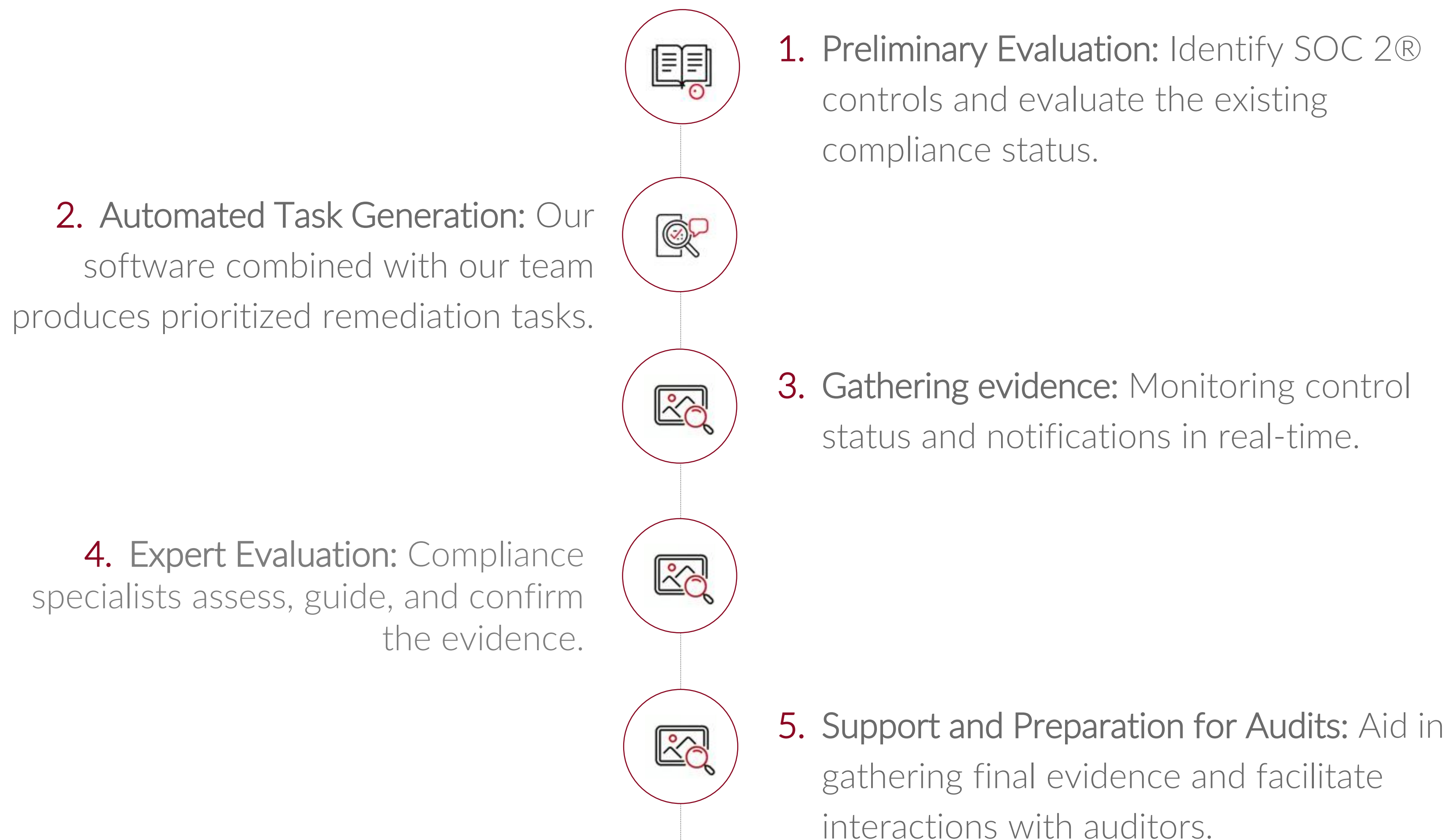
- Our software, combined with AI, streamlines repetitive and data-intensive tasks like scan ingestion and risk assessment.
- Human specialists analyze compliance requirements, offer context, and verify results.
- This partnership minimizes manual workload, speeds up audit preparedness, and maintains precision and compliance standards.

*Our white glove "Done for You" service offers the best of both worlds—AI-powered automation and expert human guidance at every step of your SOC 2<sup>®</sup> journey.*



# Customer Journey / How It Works

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# Why Choose Opsfolio CaaS for SOC 2®?

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- A reliable compliance software platform and human team recognized for meeting federal and industry standards.
- A comprehensive hybrid service that merges AI capabilities with human knowledge.
- Minimizes the time required for audit preparation and the effort needed for ongoing compliance.
- Ensures transparency, centralized oversight, and ongoing risk management.

*Experience the difference with our white glove "Done for You" service—we take full responsibility for your SOC 2® compliance journey.*





# Thank you

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**CONTACT US**

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